

## **APPENDIX 1: BIBLIOGRAPHY**

## BIBLIOGRAPHY

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## **APPENDIX 2: ISSUES MATRICES**

HEALTH SECTOR ISSUES		
Issues	Comments	Possible USAID Priority
1. Improvement of Regional Allocation Formula	The current regional allocation formula contributes to municipal deficits and offers no incentive for addition local revenue mobilization efforts	5.0
2. Examination of second stage healthcare financing strategic options	Economic growth requires reductions in social insurance payments. Development of democracy requires choice. Options build on the current NHIF system such as tax credit programs need to be analyzed.	5.0
3. Private Health Insurance Funds	Private voluntary contracting guidelines are needed, a single contracting system curtails innovations. Regulatory capacity needed in the GOB. Issues of competition, market conduct, and coordination of benefits need to be assessed. Obstacles and constraints to voluntary health insurance need to be evaluated.	5.0
4. Capital Investment Plan	Significant investment in healthcare is required. Domestic resources are insufficient, increasing sovereign debt is not a sustainable strategy. Foreign direct investment is a major option. The current extent of government control over services and payments is so great, that no substantive private direct investment in healthcare is likely.	4.0, 5.0
5. Tax treatment of the Health Sector	Taxation of healthcare particularly in difficult economic times, diminishes the ability of the people to struggle for life. Issues such as VAT, income tax on providers, import tariffs should be reviewed.	
6. Public - Private Mix	Despite efforts towards privatization, most public facilities retain public ownership and are paid with public funds	2.0, 4.0, 5.0, 6.0
7. Privatization & competition in the Health Sector	The current extent of government control over services and payments is so great, that meaningful competition is eliminated	2.0, 4.0, 5.0
8. Consolidation of the medical and financial control system in healthcare and supervision over the activities related to	Regulatory capacity needed in the GOB. Issues of competition, market conduct, and coordination of benefits need to be assessed. Voluntary health insurance needs to be reexamined as significant disincentives exist.	2.0, 5.0, 6.0

HEALTH SECTOR ISSUES		
Issues	Comments	Possible USAID Priority
mandatory and voluntary health insurance.		
9. Drug policy and practice	Rationalization of prescribing practices supported by incentives needed. NHIF pharmaceutical policy requires further development	1.0, 2.0, 4.0, 5.0
10. Targeting of Public Subsidies	If the analysis of total healthcare funding needs indicates a significant deficit, public health funding for all is not a viable option. Targeting of public funds to the most vulnerable groups will be needed	1.0, 4.0, 5.0
11. Information Technology and Analytic Capability	Efforts have been focused on the NHIF and NHIF provider based systems, many other information needs exist that either have little to do with the NHIF or cannot be appropriately collected by the NHIF such as the reporting requirements to the MOH of private insurers, providers ability to manage internal QA and determine unit costs, etc.	ALL
12. Public Health Capacity Building & Institutionalization	Management sciences, behavioral public health, health informatics, municipal health, Quality Assurance, insurance/managed care, rural health services, etc. all represent a growing and long term need which cannot realistically be filled with short term training.	ALL
13. Workforce Excess Capacity Rationalization	Retraining redundant professional staff and introducing them into a still weak economy presents both a loss of the original educational investment and low prospects for success. Tremendous healthcare professional needs in other countries provide a significant alternative.	6.0
14. Professional Excess Educational Capacity	The current professional training capacity is an under utilized asset, yet 33% of medical students are foreign. Improvement rather than closure of these facilities could increase the regional share of educational exports	4.0, 6.0
15. Aging - Development of Gerontology	Despite the fact of a rapidly aging population, gerontology has not become a national priority. Rational and effect approaches will be needed to adjust the current profile of health services to that which will be needed.	ALL

HEALTH SECTOR ISSUES		
Issues	Comments	Possible USAID Priority
16. Comprehensive approach to healthcare information	Efforts have been focused on the NHIF and NHIF provider based systems, many other information needs exist that either have little to do with the NHIF or cannot be appropriately collected by the NHIF. Health Informatics developed autonomously could fulfill the need.	ALL
17. Reconciliation of Regional Allocation Formula with NHIF payments	NHIF payments for specialist and hospital care are predicated on estimates of budget allocations significant disparities are reported	5.0
18. National Health Insurance Fund	Expressed need for capabilities in meta analysis, pharmacoeconomics, additional quality assurance development.	4.0, 5.0
19. Cardiac Disease Prevention	Treatment, early diagnosis is in development, prevention component requires assistance, #1 cause death. Mortality & morbidity highest among men. Loss of a wage earner increases the need for social protection and the likelihood of school drop out	1.0, 3.0, 6.0
20. Tuberculosis Eradication	Rapidly increasing, geographic areas of epidemic, highest among the poor and minorities. Debilitation with tuberculosis diminishes capacity to work or study. Extra pulmonary TB can lead to invalidity	1.0, 2.0, 4.0
21. Dental Health	Research is needed to determine the costs of poor dental health in terms of direct costs, lost productivity, and disability. Prevention should be paired with maintenance. No national dental program exists	1.0, 2.0, 3.0, 4.0
22. Client Advocacy	Current planning and negotiations concerning the health sector include the MOH, NHIF, and the Medical Association. Other stakeholders such as the Hospital Association, unions, and most importantly, the consumer plays no role.	2.0, 4.0, 5.0
23. NGO Assistance	It is reported that over 6,000 NGO's have been established however to date actions have not been taken to safeguard their long term sustainability. Many of these organizations are addressing the health issues of minorities, patients rights, consumers protection. Sustainable	2.0, 4.0, 6.0

HEALTH SECTOR ISSUES		
Issues	Comments	Possible USAID Priority
24. Bulgarian Hospital Association	funding would benefit all of these activities  The BHA was founded shortly after the Medical Association and represents the corporate entities as opposed to individuals. Under the privatization paradigm and the NHIF, hospitals bear considerable responsibilities and significant financial risk but at yet the BHA is not a signatory to the National Agreement.	2.0, 4.0, 5.0, 6.0
25. Absolute Healthcare funding needs	Allocations for healthcare are based on budgets and NHIF collections not costs. Knowledge of the real costs will support rationalization of the national health effort. This would include both operations and investment	5.0
26. Infrastructure Rationalization		
27. Occupational Risk Reduction	Analysis and research is needed to assess occupational and non-occupational illness, temporary and permanent disabilities leading to social welfare payments	2.0, 4.0, 6.0 1.0, 2.0, 3.0

## EDUCATION SECTOR ISSUES

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Dr. Richard J. Kraft, University of Colorado-Boulder, CO-USA  
July 16, 2001

### General Overview

**Introduction:** We find that Bulgaria has managed to maintain a high quality educational experience for a large percentage of its school age population. In fact, the system continues to provide a "world-class" traditional education for its top students through an extensive system of specialized secondary schools and higher education programs. Areas of deep concern do, however, exist. While national demographics indicate a continuing decline in the number of pupils in primary and secondary education, the percentage of minority children in schools will rise from the current 20% to upwards of 30% or even 40% in the coming decades and many of these children are not entering, dropping out, or not receiving and equal education.

**Tertiary Education.** There is little "rationalization" in the tertiary education sector, as there are so many institutions offering certificates, BA and MA programs, that a high percentage of graduates will likely remain unemployed in the future, or have to emigrate to find work. There is also general agreement that the quality of tertiary education has fallen in the past ten years. The professoriate is aging with an average age 54 and 61 for professors. The role of private higher education is still to be decided.

**Secondary Education:** While graduates of specialized secondary schools can go on to higher education and often have marketable skills in such areas as language and computers, the large majority of students in the General Secondary Track are prepared for neither work nor higher education. The preparation of Bulgarian young people for the world of work is highly problematic. Despite major efforts in the area of vocational education, too many students are unprepared to do any work in the current economy, and a significant portion of the education budget is spent on providing certificates, diplomas and degrees for nearly non-existent occupations.

**Pre-School and Primary Education:** A major area of concern at all levels, but particularly impacting the primary level is the education received by "rural" students and minority students, particularly the Roma minority and to a lesser extent Turkish children, who come less well prepared in the Bulgarian language. While many children attend pre-school programs, it is heavily weighted to towards those who can afford to send their children to these institutions. Rural communities are being heavily impacted when their primary schools are closed, multi-grade classes are taught by unprepared teachers or students are bussed to municipal schools in larger communities.

**Cross-Cutting Issues:** While the education sector tends to function somewhat independently, there are several cross cutting institutions and issues which might be appropriate for USAID to consider: The Chitalishtes (Libraries, child and adult community centers), Special Children (physical, emotional and educational needs), Vocational Training for the Social Sector (Entrepreneurial Education, Community education, Lifelong Education, Vocational Guidance), Curricular Programs (HIV, Drugs, Civic Education, Entrepreneurial Education, Service Learning), Minority and Gender Issues

(Multicultural, Bilingual, Roma, Turkish Education), and School Policy, Structure and Management (Educational programs in all social sector areas).

**10=Highest Priority for USAID Consideration (Critical Issue not much done.**

**1=Lowest Priority for USAID Consideration (Important but being covered)**

## Education Sector Issues

<b>Issues</b>	<b>Comments</b>	<b>Donor Coverage of Issues</b>	<b>Cross-Cutting Possibilities</b>	<b>Possible USAID Priority</b>
<b>1.0 Educational Policy</b>				
1. 1 Accreditation-Quality Assurance	Under new Higher Education law, countless new programs, including private. How much control or should market decide?	World Bank European Union, Open Society		4.5
1.2 Laws, Rules, Regulations-Coherence Flexibility	A near universal complaint on there restrictive nature of new laws and rules. How to maintain quality while promoting innovation?	World Bank Open Society (Indirectly)	Over-Regulated Systems	4.5
<b>1.3 School Decentralization</b>	<b>Local training of boards, and administrators needed. How much to decontrol from center? Curricular flexibility, Boards of Trustees</b>	<b>World Bank Open Society on Delegated budgets</b>	<b>Health, Social Services, and Education Decentralized-Training</b>	<b>9.0 Long US tradition of local control</b>
1.4 Lifelong Education	Strong dependency on longer term degrees and certificates? In Higher Education, Tertiary or Secondary Vocational Chitralisites?	European Union Leonardo Programme	Adult training in General Education Vocational Schools, & Chitalisites	8.0 Community Education and Community Colleges
1.5 Private Education	Governmental quality control vs. freedom of the market?	Open Society		5.5
1.6 School Finance, Resource Allocation Mechanisms	Funds from central government vary according to local wealth. Few incentives to raise municipal funds? Rich parents add additional support. Should there be school fees? Which levels? Scholarships for poor?	World Bank Open Society on Delegated Budgets	School Finance as part of whole social sector financial changes	7.5
1.7 Parallel Training System	Teachers support selves giving private lessons or teaching in special schools to prepare for Higher Education National Exam? Rules?			5.5
<b>2.0 Educational Structure</b>				
2.1 Restructuring, Rationalizing All levels due to demographic	How to cut down on duplicate unneeded Higher Education Depts.? How to maintain rural communities where Higher Education schools are	World Bank Open Society, European Union	Closing or merging schools and programs at all levels frees funds	7.5

Education Sector Issues				
Issues	Comments	Donor Coverage of Issues	Cross-Cutting Possibilities	Possible USAID Priority
decrease trends	closed?			
2.2 Graduate Research Facilities and University Faculties	How to bring teaching and research together, and prevent overlap of Institutes and Higher Education.	World Bank Open Society Indirectly European Union	Merging or closure of duplication frees funds	4.5
2.3 Vocational Education	A major problem area. Too many irrelevant, outdated, redundant schools preparing for non-existent jobs. School to Work/Career? Apprenticeships?	European Union, World Bank Open Society	School to Career could train or retrain in all fields	4.0
2.4 Pre-Schools	Little coverage of poor, rural, or minority children. Head Start type program?		Redundant teachers could teach in pre-schools/social service	5.0
2.5 Rural Schools	Many being closed, destroying communities. Need transportation and multi-grade training?		Health, Nutrition, social services	7.0
2.6 Private Education	How much to control, promote, hinder its development at all levels?	Open Society	Private schools could train for many social sector positions	5.5
2.7 International Partners Schools and Colleges	Many schools at all levels wish to develop partnerships in European Union and USA.			3.0
2.8 Charter or Alternative Schools	Almost no "alternative" schools exist in Bulgaria? How to promote innovation in an over regulated environment? Alternative curricula would open schools to other sectoral training-Not schooling to prepare for more schooling		Secondary vocational schools could prepare for health, social service occupations	9.0 With decades of experience we have much to contribute
3.0 Facilities and Equipment				
3.1 American Univ. of Bulgaria	What is the payoff for putting additional funds into this institution?	Open Society, USAID	Training programs across social sector	2.5
3.2 Computers and Software IT	Almost universally seen as "the" answer to educational problems. What is a realistic level and computerization?	European Union, WB?	Software/Hardware across social sector	5.5

Education Sector Issues				
Issues	Comments	Donor Coverage of Issues	Cross-Cutting Possibilities	Possible USAID Priority
3.3 Library materials	School and Chitalishte libraries are well stocked but outdated.	European Union	Materials in all fields	5.5
3.4 School Breakfasts and Lunches	With massive unemployment, many rural and town schools need to feed children	UNICEF	Has health and social effects	8.5 Support for UNICEF
3.5 Textbook Program	University Profs. writing textbooks for personal profit. Primary, Secondary and Higher Education students forced to buy multiple expensive books. A textbook "loan" program? Controls on publishing? Many textbooks overloaded, boring.	World Bank Open Society		6.0
4.0 Educational Management-Administration		European Union	Secondary and Tertiary training and retraining	8.5 Long US tradition in school, Community College and University Continuing Education
4.1 Lifelong Learning	Strong dependency on long term degrees, certificates. How to get informal, short-term programs. Higher Education , Chitalishtes, Secondary Vocational?	European Union	Prepare for new occupations.	5.0
4.3 Information System	Will policy makers & educational leaders use more information if available?	World Bank Open Society	Part of national MIS	3.5
4.4 Principal Training-Primary/Secondary/Vocational Schools	Experienced teachers apply. Little training occurs.	European Union	Principals as Community leaders	6.5
4.5 Public Administration Training	Major concern at all levels. Is this an European Union responsibility?	European Union	Health, Education ,Social	4.0
4.6 Higher Education Management Training	No current training program in Higher Education administration exists.	World Bank Open Society		3.0
4.7 Organization/Structure of	This highly problematic area is extremely political.	World Bank Open Society		3.0

Education Sector Issues				
Issues	Comments	Donor Coverage of Issues	Cross-Cutting Possibilities	Possible USAID Priority
Higher Education 4.8 Higher Education Fund Raising/Grants/Patents	Higher Education like other educational sectors is under funded. Are their private and international sources to tap?	?		3.5
5.0 Curriculum and Instruction				
5.1 Overcrowded Curriculum	Traditional curriculum contains up to 35 classes in 14 disciplines weekly. Tradition dictates the curriculum and it should likely conform to European Union expectations.	World Bank Open Society, European Union		4.5
5.2 Standards Gr. 1-12	A major effort is underway. The only real question is to how realistic standards are in some subject areas and grade levels.	World Bank Open Society, European Union	Improve all professions	5.0 US has much experience, but European Union is key here
5.3 Entrepreneurial Education	Almost non-existent despite 98% of jobs being created by SME.		NGOs, Businesses, Health,	8.5 High Priority-Jr. Achievement and curriculum penetrations
5.4 School-to-Work/Career Programs: Apprenticeships, internships	Almost non-existent. General Secondary students unprepared for university or world of work. Could use German, Scottish or US models.		Preparation for all careers	9.0 High Priority-but perhaps left to European Union
5.5 Interdisciplinary Curricula Middle/Secondary Education	Attempts at interdisciplinary curriculum in lower secondary fought against by teachers. Is it worth the effort?	Indirectly World Bank Open Society	Tied to all fields	6.5 USA Strong in this, but problematic to implement
5.6 HIV/AIDS/STD Education	Tied to Health curriculum. No doubt a growing concern.		Closely tied to Health Sector	4.5 Possible, but UN and others covering it.
5.7 Character and Values Education	Growing concern over character and values, but is this the best approach? Service-learning, community involvement more powerful.	Open Society	Civic Education	3.5 Much Curricular experience but

Education Sector Issues				
Issues	Comments	Donor Coverage of Issues	Cross-Cutting Possibilities	Possible USAID Priority
5.8 Service Learning	Strong need for community involvement, but bad memories of forced work under old regime. Can serve as a major curricular reform effort.	Community involvement in all fields	little effectiveness evidence	8.0 Strong USA leadership in this. Must be carefully implemented
5.9 Modular Curriculum Design	Many programs have developed these, particularly vocational programs. Does US have much to contribute?	World Bank Open Society Indirectly		1.5 Let local and European Union experts do it.
5.10 Pre and/or In-Service Teacher Education on Pedagogy	Recent emphasis on hands-on, active, group, cooperative learning. Good trend, already underway.	World Bank Open Society	7.5 US and other donors should continue	
5.11 Instructional Technology	Great faith in IT as the answer to most educational issues. Obviously need to bridge the digital divide. Quality software?	USAID, European Union,		5.5 Possible involvement
5.12 Civic Education	Current strength in the NGO sector, not much in schools. Needs to be embedded in curriculum of schools not as an extra. Next generation needs to learn civic participation.	Open Society	Local Government Initiative, NGO	8.5 High Priority. Lessons learned in USAID civic involvement could transfer well here. Service Learning
5.13 English Language Instruction	There is a growing need for quality English instruction, as other languages are losing students rapidly to English.	European Union	British Council	5.0 Possible-Peace Corps, Library materials,
5.14 Multi-grade Instruction-Primary	Rural schools are closing, and some could be "saved" with good multi-grade program. Closure of a school often condemns the community.			8.5 Priority- Particularly using methods of New School movement in Latin America
5.15 Special Education	The country appears to be moving towards mainstreaming of special populations.	Open Society	Health and Social Services also	8.5 A critical area for equity reasons

Education Sector Issues				
Issues	Comments	Donor Coverage of Issues	Cross-Cutting Possibilities	Possible USAID Priority
5.16 Drug Education	Growing need, but few countries are very successful at intervention programs.		Vitally related to others social sectors	7.0 Possible activity
6.0 Teacher Education	There is little need for new teachers, except in some rural and minority area. Merge, close, find new role, or retrain Faculties of Pedagogy.			3.0 Political decisions not assistance needed here
6.1 General Pre-service Education	Univ. Depts. of Pedagogy and Retraining Centers both do In-service training. Some Retraining centers appear stronger than University faculties.	World Bank Open Society	Teachers as community leaders	7.0 Some high quality retraining already going on
6.2 General In-Service Education	Little or no pre-service teacher education in bilingual, multicultural, civic, HIV/STD, entrepreneurial education		Lift up all groups in society	8.0 High Priority, but few new teachers hired
6.3 Pre-Service Multicultural Teacher Educ.	Very limited in-service training or retraining for teachers to work with minority children.		Tied to other social sector efforts	9.5 Highest Priority Major retraining effort needed
6.4 In-Service Multicultural Teacher Education	Teachers Teaching Teachers has proven the most cost-effective mechanism for in-service teacher training		Tied to other social sector efforts	8.5 An effective, less expensive retraining
6.5 Teacher Circles	Very few minority teachers. Need for extensive program to keep and promote minority children through the system.		Tied to other social sector efforts	10.0 Programs to bring minority teachers into profession critical
6.6 Minority Teachers	Commentary and Questions on the Issues	World Bank, Open Society	Cross-Cutting POSSIBILITIES 1800 POSSIBILITIES	Possible USAID Priority
6.7 Special Education Training	Minority children are over represented in Special Education schools. With Mainstreaming as new policy the schools face a major teacher education		Tied to other social sector efforts	9.5 With 20 years experience in mainstreaming US

Education Sector Issues				
Issues	Comments	Donor Coverage of Issues	Cross-Cutting Possibilities	Possible USAID Priority
	task.		has much to contribute	
6.8 Vocational Teachers	Currently must have Higher Education degree. Is this necessary for technicians?	European Union		4.5
7.0 Assessment and Evaluation	The testing center is being formed in the MES.	World Bank Open Society	5.0 Testing and assessment experts could be provided	4.5
7.1 Testing Center-Agency	Formative assessment is as or more critical than summative. Little information on status at this time.	World Bank Open Society		
7.2 Classroom Assessment and Evaluation		World Bank Open Society		
7.3 Grade XII Graduation/Higer Education Entrance		World Bank Open Society	5.5 Assistance of testing center could be important here	3.5 Assistance of testing center could be important here
7.4 Grades (7) 8 National Examination	The current grade 7 (8) test will need to be reexamined in the future. Should lifetime decisions be made at age 14?	World Bank Open Society		
8.0 Community Education and Involvement				
8.1 School Trustee Committees	These boards or committees are critical for civic participation and school reform	Catholic Relief	Community Development	7.5 Could be a critical contribution
8.2 Chitalistes	These fascinating institutions are functioning educational and community institutions	UNDP	Could be used for all sectors	7.0 Ways to support UNDP in this could be helpful
8.3 Service Learning	As discussed above, service learning breaks down barrier of school and community, leads to school to work, and contributes to civic education		Students can be involved in all vocational and social sectors	7.5 US is world leader in this area
9.0 Research	Few institutions follow what happens to graduates.			4.5
9.1 Follow-up Studies of Graduates-all levels	Could become a part of law, rules or regulations.			

Education Sector Issues				
Issues	Comments	Donor Coverage of Issues	Cross-Cutting Possibilities	Possible USAID Priority
9.2 Academic Achievement Studies	Other than International Studies on Achievement little research on classrooms, teaching and learning, class size, rural-urban, time etc. research.	World Bank Open Society		6.5 Little in the way of hard data is available
9.3 Basic Research	There appear to many international quality researchers in Higher Education and Res. Institutes.	Could involve social sector research		4.0 This is a national and European Union responsibility.
10.0 Gender				
10.1 Teaching Staff	Feminization of teaching staff. How to attract men to the profession?			5.0 Important, but hard to impact given salaries
10.2 Administration	Women appear to hold significant administrative posts at almost all levels of education			3.0 No real action needed
10.3 Students	There appears to be little evidence of general discrimination against girls or women in the educational sector.	NGOs		2.5
10.4 Minority girls and women	There appears to be significant difficulties, particularly in the Roma community on equal opportunity.		Broad Social implications across sectors	8.5 Any programs for Roma teachers, schools and children must address gender issues.

## SOCIAL PROTECTION SECTOR ISSUES

Issues	Comments	Donor Coverage of Issues	Cross-Cutting Possibilities	Possible USAID Priority
<b>1. Social Assistance</b>				
11. Municipal Capacity	Funding of social assistance; managing delivery of social assistance; caring for de-institutionalized children; coordination of Municipal social assistance and National employment programs; adequacy of social assistance as safety net for poor; management skills of social assistance staff	USAID/LGI; World Bank; Save the Children, UNDP; Dutch		Capacity building in Social Protection adequacy of assistance programs; One-Stop Social Protection Pilot Demonstration
1.2 Targeting Social Assistance	Most vulnerable groups; rural poor; transparent eligibility criteria; official poverty line for Bulgaria	UNDP; World Bank; USAID/Pledge		One-Stop Social Protection Pilot Demonstration; TA to develop official poverty line for Bulgaria
1.3 Children	National Juvenile Justice System; institutionalization of children; child abuse within family; national policy for protection of disabled and handicapped children; attitudes towards Roma children; trafficking in children for commercial sex market	Save the Children, UNDP, Japanese Social Protection Fund, World Bank, Dutch		Assessment of family violence; assessment of assistance to Roma integration; assessment of discrimination against disabled and handicapped; assessment of trafficking of women in commercial sex trade
1.4 Public awareness	Assistance eligibility requirements; social assistance services available; effective ways to participate in social assistance system	UNDP Capacity 21 Project and White Paper on Reform		One-Stop Social Protection Pilot Demonstration

SOCIAL PROTECTION SECTOR ISSUES					
Issues	Comments	Donor Coverage of Issues	Cross-Cutting Possibilities	Possible USAID Priority	
1.5 Financial sustainability	Work incentives in social assistance; stricter criteria for eligibility.	Actions World Bank		One-Stop Social Protection Pilot Demonstration	
<b>2. Labor Market Policies</b>					
2.1 Efficiency	Matching people with job skills to available jobs requiring these skills; job mobility, especially for rural unemployed; regional differences	USAID/Pledge; UNDP Jobs Project		Possibly expand funding for Pledge Project include more coverage of vulnerable populations	
2.2 Access	Gender equality; minority access; low skilled; publication of job openings	USAID; Dutch	Gender equality;	Assessment of gender and minority equality in job access; assess public awareness of job openings	
2.3 Job Training	Retraining as in “quick start”; life long training for elderly; “new economy” training; low skilled; antiquated skills; inadequate pre-layoff services	USAID/Pledge; World Bank		Expand Pledge funding to boost pre-layoff services training	
2.4 Taxation	Compliance in paying payroll taxes; shadow economy; reduction in labor costs (via lower labor taxation);	World Bank; USAID Pension Project		One-Stop Social Protection Pilot Demonstration	
25. Unemployment	Youth unemployment; active labor measures; unemployment fund – location and operation; local economic development (e.g., small businesses); long-term unemployment (especially for minorities); pre-layoff services; “discouraged (unemployed) workers’ drop out; regional differences; barriers to small business development	USAID/Pledge; World Bank, UNDP		Assessment of barriers (unnecessary regulations, corruption) to small business development	
2.6 Dispute Resolution	Improve labor legislation; improve methods of dispute	EU/Phare; USAID;			

SOCIAL PROTECTION SECTOR ISSUES				
Issues	Comments	Donor Coverage of Issues	Cross-Cutting Possibilities	Possible USAID Priority
<b>3. Pension Policy</b>				
3.1 Fiscal Sustainability	Long term State capacity to fund pension programs; work incentives in pension programs; incentives to encourage employers to pay social security contributions; tax legislation on voluntary contributions to pension fund (i.e., 3 <sup>rd</sup> Pillar); ratio of pensioners to workers paying into system	USAID/Pension Reform		One-Stop Social Protection Pilot Demonstration
3.2 Transparency	Linkage between benefits received and contributions made; linkage to social assistance	EU, World Bank		One-Stop Social Protection Pilot Demonstration
3.3 Awareness	Government and citizen awareness of pension reforms	USAID/Pension Reform Project; UNDP Capacity 21 Project		One-Stop Social Protection Pilot Demonstration
3.4 Coordination	Coordination of Social assistance, unemployment programs and social insurance; exchanging data/information on contributions and payments.	USAID/Pledge; Pension Project;		One-Stop Social Protection Pilot Demonstration
3.5 Capacity Development	Modern accounting standards for investment firms; modern actuarial methods; unified beneficiary data base; modern tools investment quality rating; custodial banking capacity of depository banks; tax and social insurance collection capacity; unified revenue collection capacity; training in modern pension methods for people employed in the pension insurance companies	USAID/Pension Reform, assistance to banking sector, US Treasury,		One-Stop Social Protection Pilot Demonstration; TA in monitoring and evaluation
<b>4. Inter-Sectoral</b>				
Monitoring and Evaluation Capacity	Data availability and quality; monitor assistance delivery; reform results accountability; Agency for State Internal Financial Control and Chamber of Audits monitoring and evaluation capacity; monitoring of donor assistance from various sources	EU training in accession processes	Monitoring and Evaluation Capacity	

## **APPENDIX 3: PERSONS CONTACTED**

## PERSONS CONTACTED

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Marlena Nikolova	Ministry of Labor and Social Policy	Sofia, 2 Triadica str
Meuzune Beitulova	Director, Women Association Birilik	Targoviste
Mihail Bachvarov	Ministry of Labor and Social Policy	Sofia, 2 Triadica str
Milka Mladenova	Black Sea Women Association - 2000 Bourgas	"Lazur" bl. 15, ap. 24
Mira Radkova	Deputy Minister, Ministry of Labor and Social Policy	
Mr. Neikov	Ministry of Labor and Social Policy	
Mr. Pranchov	Higher Education Directorate, Ministry of Education	
Mr. Rashidov	Mayor, Isperih Municipality	
Mr. Rousse Marunov	Chitaliste Nadezhda	Targoviste
Mr. Uzunov	Mayor, Razgrad	
Mr. Yakub	Mayor, Samuil Municipality	
Nadia Kozhuharova	Trafficking Program Manager, Animus Association Foundation?	30 Slavyanska strl, 4th floor
Naheed Islam	Sociologist, SEGA	
Neda Krustanova	Open Society	Sofia, Solunska 56
Nedialka Miteva	Ministry of Labor and Social Policy	
Nikola Abadjiev	President, Pension Associatioin	Sofia
Nora Bobcheva	Student, Youth Forum 2000	Razgrad
Plamen Dimitrov	Director, New Way Association	Targoviste
Prof. Dr. Georgi Karasimeonov	Institute for Liberal Strategies	

Social Protection Sector		
Name	Organization	Address
Prof. Popov	Director, National Public Health Center	Sofia, D. Nestorov, 2nd Floor
Regina Indjeva	Women's Alliance for Development	
Rositza Elazar	Center for the Study of Democracy	
Rumen Radkov	Social Protection Foundation	Sofia, 37 Ekzarh Iosif str, Floor 5
Rumen Tkorov	Deputy Mayor, Targoviste Municipality	Targoviste
Stanimira Hadjimitova	NGO Focal Point, Gender Project for Bulgaria Foundation	
Stanyo Stanev	NIE	
Stefan Popov	Open Society	Sofia, Solunska 56
Stoila Bongalova	"Marketing, Media, Analysis" Agency	
Stoyan Koev	Student, Youth Forum 2000	Razgrad
Stoyan Nikolov	Director, Open Society Club Varna	Varna
Susan Mathis	Health Reform Project	Sofia, 10 Plachkovska str
Syuzan Arifova	Student, Youth Forum 2000	Razgrad
Tamara Kovacheva	"Women without Osteoporose"	
Tatiana Kmetova	"Open Society" Foundation	
Tatyana Vassileva	Ministry of Labor and Social Policy	
Temenujka Jeliazkova	European Network of Police Women - Bulgaria	
Totio Mladenov	Podkrepa	Sofia, Garibaldi sqr.
Vera Tagarinska	Office of the President	
Verginia Mitcheva	Judge, Regional Court	Razgrad
Violeta Mircheva	NIE	
Vlatko Gligorov	National Drug Council, Ministry of Health	Sofia, 39 Stamboliiski blvd
Yanka Takeva	Teacher's Trade Union	Sofia, 11 Parensov str
Yavor Genev	Consultant/Board Member, Youth Forum 2000	Razgrad
Yordanka Zakirska	NIE	
Zdravka Safari	Women Organization of Euroleft Party	
	Social Protection Foundation	
	National Institute for Education	Sofia, Tzarigradsko shose, Block 5

## **APPENDIX 4: STUDY TEAM ITINERARIES**

## STUDY TRIP OF THE HEALTH TEAM

(13-15 July 2001)

### PARTICIPANTS

James R. Marzolf, health expert  
Nikola Vassilev, health expert  
Roumiana Karapetrova, interpreter  
Nadejda Geneva, health economics expert\*

### PRELIMINARY PROGRAMME

#### July 13, Friday

- Departure from Radisson Hotel
- Meeting with the Mayor of *Sevlievo* a. team
- Lunch
- Departure from *Sevlievo*
- Visit to a General Practitioner's office in *Kilifarevo*
- Free time
- Dinner

#### July 14, Saturday

- Departure from Kilifarevo
- Meeting with the Mayor of *Omourtag* a. team ± local NGO's
- Lunch
- Departure from *Omourtag*
- Visit to the Community Hospital in *Dulovo* (TBC)
- Dinner

#### July 15, Sunday

- Meeting with the Mayor of *Dulovo* a. team ± local NGO's
- Lunch
- Departure from *Dulovo*
- Meeting with the Mayor of *Isperikh* a. team (TBC)
- Departure from *Isperikh*
- Arrival at Radisson Hotel a. late dinner

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\* Deputy Director, Hospital "Pirogov" (Sofia); Former Head (1992-1999), Dpt of Finance, MoH.

**STUDY TRIP OF THE EDUCATION TEAM**  
(11-13 July 2001)

**PARTICIPANTS**

Richard Kraft  
Anna Maria Totomanova  
Nora Ovcharova  
Interpreter

**PRELIMINARY PROGRAMME**

**July 11, Wednesday**

- 08:00 Departure from Radisson Hotel
- 12:30 Arrival in Turgoviste; meeting with the mayor and RIO
- 14:00 Lunch
- 16:00 Shumen; Meeting with the dean of the Shumen University
- 19:00 Arrival in Varna; Check In - Hotel

**July 12, Thursday**

- 08:00 Departure
- 09:00 Meeting in VINS (Varna) with the dean or his deputy.
- 11:30 Meeting with the principal of the Teacher Qualification and Pre-qualification Institute
- 13:30 Lunch
- 16:00 Albena – International Tourism College

**July 13, Friday**

- 09:00 Meeting with teachers

The rest of the program is to be announced

## **STUDY TRIP OF THE SOCIAL PROTECTION AND ASSISTANCE TEAM**

(July 11 –13)

### **PARTICIPANTS**

Tom Cook  
Nikolae Nikolov  
Katia Alexevia  
Douglas Grube  
Mariana Revenska

### **PRELIMINARY PROGRAMME**

#### National Employment Service Office

- Focus: Current employment situation
- Programs of assistance for unemployed
- Major problems in the area is assisting unemployed
- Regional Trends in unemployment and the outlook

#### Minority Organizations

- Focus: Services Available to minority population
- Donors working in the area
- Government or other programs available
- Major issues

#### Local Union

- Focus: Labor situation
- Problems/Services being provided to unemployed
- Special groups

#### Social Service NGOs working in the area

- Focus: Perspective on major social problems
- Current efforts/ activities to address them
- Major gaps in social services and how they can be addressed in the future

#### Regional Development Office

- Focus: Overview of the extent of social assistance needs and the gap between needs and resources at the regional level
- Social Assistance in the context of the regional development plan.

#### Mayor/ Municipal Administration

- Focus: Gaps in Social Protection
- Role of municipality in Social protection and social service assistance
- Ability of municipality to meet requirements for social services/ social protection
- Might arrange a meeting with several mayors to get broader vision/ perspective